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## **California's Homeowner and Renter Assistance Program: An Important Benefit for You**

California's Homeowner and Renter Assistance (HRA) Program provides qualified individuals with an annual payment based on the amount of property tax paid directly by homeowners or paid indirectly by renters as part of their rent. This non-taxable payment is intended to partially offset direct or indirect property tax costs to low-income seniors, and blind or disabled individuals. The California Franchise Tax Board (FTB) administers this program, but you can qualify for and receive this benefit even if you do not file a California income tax return. In fact, you must file a separate HRA claim form even if you do file a tax return.

For 2006, homeowners can receive a maximum of \$472.60 in assistance while renters may receive a maximum of \$347.50 in assistance, based on the amount of the claimant's household income last year.

To help you better understand this important and valuable benefit, here are some frequently asked questions and answers regarding California's HRA Program.

### **Q: Who is eligible for the HRA Program?**

A: If you are a homeowner or renter who meets all of the following qualifications, you are eligible for the program:

- You were either 62 years or older, blind, or disabled on December 31 of last year;
- You had a total household income of no more than \$40,811 in 2005 (this amount is indexed for inflation and changes from year to year);
- You own a home and lived in it or lived in a qualified rented residence subject to property tax; and
- You were a U.S. citizen or a qualified immigrant with legal residency status at the time the claim is filed.

### **Q: What do I need to do to file for Homeowner or Renter Assistance?**

A: Obtain a HRA Claim Booklet, Form 9000H/9000R from FTB. (Form 9000H is for homeowners, and Form 9000R is for renters.) This booklet contains the form you will need to complete, instructions, a detailed explanation of the eligibility requirements, and answers to many questions you may have regarding the program. The HRA Claim Booklet is available after July 1 of each year.

If you filed for HRA for the previous year, FTB will automatically send the appropriate forms to you. If you have moved or are filing for HRA for the first time, you may contact FTB toll-free at 1-800-868-4171 or download the information by visiting FTB's website at [www.ftb.ca.gov](http://www.ftb.ca.gov).

**Q: What kind of documentation do I need to qualify for assistance if I am a homeowner?**

A: You will need to include a copy of your property tax bill with your application if you are filing as a homeowner for the first time. In subsequent years, you will not need to include the bill, unless you have moved to a different residence. If you own a mobile or manufactured home and your home is not on the property tax rolls, you will need to include copies of both your California Department of Housing and Community Development-issued registration card and your renewal billing notice.

**Q: What is a qualified rented residence?**

A: A qualified rental residence may be any of the following: a single family residence, town home, condominium, apartment, hotel or motel room, room in a boarding house, houseboat, manufactured home, or a mobilehome as long as it is your principal residence. The residence must be located in California and subject to property tax, and you must have paid at least \$50 per month in rent.

However, if you are a patient in a medical care facility such as a nursing home, convalescent hospital, or other type of facility that provides care, you generally cannot qualify for assistance because the amounts you pay are considered to be for medical care and not solely for the right to live there.

**Q: How can I determine if the property I am renting is subject to property tax?**

A: You can determine if your rented residence is subject to property tax by inquiring with your landlord or contacting your county assessor's office. If your landlord pays property tax on the residence you rent or your landlord makes substantially equivalent payments in lieu of property taxes on the residence, then you as the renter are eligible for renter assistance. Amounts paid in-lieu of property tax are considered to be "substantially equivalent" to property tax if they are equal to at least 80% of the tax assessed on comparably valued properties.

Please note that only the general property tax qualifies for purposes of this program. Amounts such as parcel assessments that are paid with a property tax bill for bonds or special assessments are not considered to be property taxes.

When a rented residence receives a partial or full exemption from property tax, its tenants generally will not be able to qualify for renter assistance. Government-owned property and certain low-income housing units are exempt from property tax.

If you are unsure whether your rented residence is exempt from property tax, your county assessor generally will be able to tell you over the phone whether or not your residence is subject to property tax. A list of county assessors is on the BOE's website at <http://www.boe.ca.gov/proptaxes/assessors.htm>.

**Q: What types of rented residences receive partial or full exemptions from property tax?**

A: Generally, subsidized housing and housing owned or managed by a non-profit or governmental agency such as the U.S. Department of Housing and Urban Development (HUD), a city or county housing authority, or a redevelopment agency may receive a partial or full exemption from property tax. Many low-income renters pay reduced rents as a result of property tax exemptions. Therefore, although many renters of residences exempted from property tax are not eligible for HRA, they have already received the benefit of lower rent due to the property tax exemption.

**Q: What documents can I use to show the FTB I am 62 years or older?**

A: You can provide FTB with a copy of any one the following documents to show your age: a birth certificate, Medi-Cal benefits identification card, hospital birth record, church baptismal record, your California driver's license or identification card, or a Social Security Administration benefit award letter that states your age. If you cannot provide any of these documents, FTB will consider other documents you may have that show your age. However, be sure to explain how the alternative document demonstrates you are 62 years or older. Be sure to send FTB a copy only of any documents showing your age—do not send your original documents to FTB.

**Q: What documents can I provide to FTB to show I am blind?**

A: For HRA purposes, you will need to provide a statement from a physician stating that you have either no better than 20/200 vision with correction or tunnel vision limited to a field of no more than 20 degrees, to be considered blind.

**Q: What documents can I provide to FTB to show I am considered disabled?**

A: To be considered disabled, you must be unable to engage in any substantial gainful activity because of a physical or mental impairment that existed as of December 31 of the year prior to filing and that impairment is expected to last for a continuous period of 12 months or longer.

To demonstrate you were disabled for a 12-month period (including December 31, 2005), you can provide FTB with a copy of any one the following documents: your Medicare card [if you are receiving Supplemental Security Income (SSI) disability benefits]; your Social Security Award letter notifying you that you qualified for benefits as a disabled person in 2005; a SSI payment decision that shows payment amounts received for 2005; or documentation that is accepted by a local, state, or federal agency as proof of disability.

Be sure to send a copy only of any documents showing your disability—do not send your original documents to FTB.

**Q: If I am permanently blind or disabled, do I need to provide documentation to FTB annually?**

A: No. If you are permanently blind or disabled, you are only required to demonstrate this to FTB the first year you file an assistance claim. However, if you suffer from a temporary disability, you will need to provide information demonstrating your disability for each year you file an assistance claim.

**Q: My minor child is disabled and lives with us in the family home. We rely on his/her monthly benefits to help pay the rent. Can I file a renter assistance claim on behalf of my child?**

A: No. Minor children living in the home of a parent or guardian are not eligible for assistance because minor children cannot be legally bound to a rental contract. However, if minor children live

outside the family home and can show they are paying rent with their own money for the residence where they are living, they may qualify for assistance.

**Q: How do I determine if I am a qualifying immigrant, and what documents do I need to provide?**

A: Most immigrants who legally reside in the United States are eligible for HRA. These include all categories of immigrants who are eligible for public assistance under the federal welfare reform law, including residents, asylees, refugees, and parolees. Some categories require you to reside in the United States for more than one year to qualify for HRA benefits. Undocumented immigrants are not eligible for HRA. If you have questions regarding your eligibility related to your immigration status, please consult the chart on page 10 of the FTB Form 9000H/9000R Claims Booklet or call FTB for further clarification.

**Q: When should I file for 2006 homeowner or renter assistance?**

A: You should file your claim between July 1 and October 15, which will enable you to receive any assistance you are entitled to within 15 weeks from the date of filing. If you file after October 15, you may experience a delay in receiving your assistance payment. The final filing deadline is June 30 of the year after the claim year. The only exception that allows you to file your claim after that date is if you were unable to file due to a medical incapacity.

You are “medically incapacitated” if you are unable to attend to your own personal needs and activities of daily life, including matters such as your own personal hygiene and nutrition.

If a medical incapacity prevents you from timely filing your claim, you must file your claim within six months after your medical incapacity ends, but not later than two years after the regular final filing deadline. There are no other exceptions that will allow you to file beyond the normal deadline.

Examples:

- In order to file a 2005 HRA claim, you must have been at least 62 years of age, blind, or disabled on December 31, 2004. The income limit is determined by reference to your 2004 household income. The claim form must be filed no later than June 30, 2006. If a medical incapacity prevents you from filing on time, you may file the claim within six months after the end of the medical incapacity, but you cannot file any later than June 30, 2008.
- In order to file a 2006 HRA claim, you must have been at least 62 years of age, blind, or disabled on December 31, 2005. The income limit is determined by reference to your 2005 household income. The claim form should be filed between July 1, 2006, and October 15, 2006, in order to ensure that you receive timely payment. If you miss that window, you can file the form as late as June 30, 2007. If a medical incapacity prevents you from filing on time, you may file the claim within six months after the end of the medical incapacity, but you cannot file any later than June 30, 2009.

## **Available Resources**

The following resources are available for you to learn more about California's HRA program and to assist you in determining whether you qualify for HRA or need help filling out your claim form:

- **Publications and Forms**: To obtain the HRA Claim Booklet and forms or for assistance with completing your claim form, call the FTB toll-free at 1-800-868-4171 or visit FTB's Web site at [www.ftb.ca.gov](http://www.ftb.ca.gov).
- **Free Volunteer Assistance**: Volunteers are available between July 1, 2006 and October 15, 2006, to provide assistance at many locations throughout California. To get the address of a Homeowner or Renter Assistance volunteer site near you, call FTB toll-free at 1-800-868-4171 or visit FTB's Web site at [www.ftb.ca.gov](http://www.ftb.ca.gov).
- **Local Senior Citizens Information and Referral Service (SCIRS)**: Your local SCIRS provides information and assistance on a broad array of services. You may call the California Department on Aging toll-free at 1-800-510-2020 for the phone number of the Information and Assistance Provider located in your area